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## METAPHOR AS A PERSUASIVE TOOL IN BUSINESS STRATEGY

The article aims to discuss the levels of application, efficiency, as well as potential dangers and methods of avoiding them which can be encountered while applying metaphors in formulating a business strategy. The theory underlying the research is the Conceptual Theory of Metaphor by Lakoff and Johnson (1980) and the analysis was based on an article presenting a new business strategy – the *Blue Ocean Strategy* devised by Kim and Mauborgne (2005a).

### 1. Introduction

One of the problems encountered by executives introducing new strategies is the type of argumentation they should use to convince the listeners of their idea. It is often not enough to present a set of bare numbers or facts – what must also be taken into account is the very medium of argumentation – the language. And one of the aspects of language that builds the success of a strategy is an adept application of conceptual metaphors, which is the major theme of the present article.

After the introduction of the concept of strategy and some factors influencing its formulation as well as its characteristics, the analytical tool is presented – the conceptual metaphor theory (henceforth called the CMT). This theory is consequently applied to an analysis of the language used by Kim and Mauborgne (2005b) in their article devoted to the *Blue ocean strategy*. The analytical part is devoted to two issues: first, the conceptual metaphors applied in the presentation of the strategy, their structure, and the reasons for their persuasive character. The second issue concerns the persuasive character of the whole message, as the persuasive power of every separate metaphor applied in a text does not necessarily result in the persuasive character of the whole text, that is, speakers should also be attentive not to apply divergent metaphors weakening the message. The article is concluded with general considerations concerning the article.

## 2. Strategy – definition and characteristics

First, I would like to discuss one of the key notions of the present analysis – strategy. Generally, strategy is formulated as the third and, at the same time, the last stage of the strategic planning. The first stage is formulating the corporate mission – the most general statement of a company purpose, that is, what it wants to accomplish in the environment (Kotler *et al.* 1999: 87ff). On the basis of the mission, corporate objectives are developed – a corporate objective is a statement of an end result desired – what is to be accomplished by the company (Loudon *et al.* 2005: 129). The final stage is the development of the overall corporate *strategy* or strategies, which are means of accomplishing the objectives (ibid.).

Devising a strategy is a significant moment in every company because it helps to set the business into motion and to make sure it is going in the right direction. In particular, devising a strategy entails (Williams 2009: 7):

- setting the direction and scope of the organization,
- planning how to meet the needs of the customers over a period of years,
- identifying signposts that confirm the company is heading in the right direction and is making good progress on the journey.

Metaphorically, one can say that a strategy is like a map – “it enables you to map the roads and junctions along the way, so that you can plot your way and, critically, measure your progress” (ibid.: 8). In other words, it is an indispensable element that a company can hardly function without.

## 3. The conceptual metaphor theory

The linguistic tool which I wish to apply in the analysis is the CMT devised by George Lakoff and Mark Johnson (1980). The conceptual metaphor rests on the notion of the conceptual domain – “any coherent organization of experience” (Kövecses 2010: 4). Within a metaphor two such domains are paired and one of them functions as the source domain, while the other as the target one. Typically, conceptual metaphors employ “a more abstract concept as target and a more concrete or physical concept as their source. Argument, love, idea, and social organization are all more abstract concepts than war, journey, food, and plant” (ibid.: 7).

What allows us to postulate conceptual metaphors are metaphorical expressions which abound in language, e.g. “I’ve had a *full* life. Life is *empty* for him. There’s *not much left* for him *in* life. Her life is *crammed* with activities. *Get the most out of* life. His life *contained* a great deal of sorrow. Live your life *to the fullest*” (Lakoff, Johnson 2003: 51). These examples revolve around two domains: LIFE and CONTAINER (traditionally, both domains and conceptual metaphors are written in small capitals), out of which LIFE is the target, more abstract domain, and CONTAINER is the source, more concrete domain.

The conceptual metaphor which we can consequently formulate takes the following form: LIFE IS A CONTAINER. What such a pairing establishes is a specific type of relationship that begins to hold between the two domains, and within the CMT it is called mapping<sup>1</sup>. This means that the source domain imposes some structures on the target domain thanks to which the latter domain is (more easily) understood. In this case, some container properties are imposed on life, e.g. life has boundaries capable of holding some contents (it can be *full*, *crammed*, *empty*, or *contain* something), something can be put into it or taken out (*in her life*, *get the most out of your life*), etc.

Among many aspects of the CMT, I would like to mention one more: highlighting and hiding<sup>2</sup>. The domains which conceptual metaphors base on can be extremely complex, multifaceted constructs – all facts we know and associations we have about each of them constitute elements of a domain (cf. Taylor 2002: 201ff). This refers both to the domain of LIFE as well as to the domain of CONTAINER. Let us take a simple container – apart from the properties mentioned in the previous paragraph we also know that they are limited in size, can have numerous sizes and shapes, can be made of different materials and, as a consequence, reveal different properties – when we put something into a container it becomes (unless the sides are transparent) invisible for us and, conversely, when we take something out of a container it becomes visible, etc. However, the conceptual metaphor LIFE IS A CONTAINER does not make use of *all* this knowledge – only certain elements of it are emphasised. Consequently, after Kövecses (2010: 93ff), I refer to such activation of only some elements of the source domain as its *partial metaphorical utilization* (highlighting in Lakovian terms).

Life and its domain constitute a similar case with only one exception – they are much more complex, just like our knowledge of life compared to the knowledge of a container. What is more, in a metaphorical mapping not all elements of the target domain are activated, either, but in the case of the target domain this is called *highlighting* (Kövecses 2010: 91ff). What the metaphor emphasises in the domain of LIFE is the fact that in its duration life consists of different experiences which are gradually accumulated. Consequently, we can say that life *is full/ empty*, there's *not much left in* life, life *contains* sorrow, etc. What remains in the background, in turn, are e.g. all social aspects of life, the

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<sup>1</sup> The term mapping caused a lot of controversy among the scholars dealing with the CMT: some interpreted it as imposition of structure (e.g. Gibbs 1994), while others (e.g. Kövecses 2010) as correspondence. Lakoff and Johnson (1980) applied both of these terms, though in the Afterword to the 2003 edition (Lakoff, Johnson 2003: 252ff) their conclusion was that imposition is the right choice. However, if the image schema theory is embedded in the CMT, it can be noticed that there is more of a *correspondence* between domains at the image schematic level and *imposition of structure* at the higher, culturally-specific level (Drożdż 2007).

<sup>2</sup> Albeit seemingly straightforward, these terms needed elaboration. After the criticism from e.g. Clausner and Croft (1997), Grady (1997) suggested an alternative notion: the centrality of mapping. In the present article these terms are used in the limited sense introduced by Kövecses (2010: 91ff).

progress of life, our plans and means of fulfilling them, our professional life, problems we encounter in life, etc.

What is particularly interesting about conceptual metaphors is that they do not require numerous or common expressions to start functioning in our mind – sometimes one expression which establishes a link between two domains is enough to set our mind in motion. To illustrate it I will refer to the quotation given at end of the previous chapter where strategy was discussed. What Williams (2009: 8) actually does in this sentence is explain quite plainly what a strategy is. Because strategy is an abstract notion which can be understood differently and the readers, even if they understand it, still may not know how to do business properly, the author makes use of metaphorical language. This short quotation provides us with all necessary elements to identify the conceptual domains, formulate a conceptual metaphor, realize the metaphorically utilized parts of the source domain and the highlighted elements of the target, as well as point to the metaphor's entailments.

The comparison of a strategy to a map yields two conceptual domains: a more concrete one – the source domain of MAP, and a more abstract one – the target domain of STRATEGY. Although the latter domain is the one we know little about and wish to comprehend it in order to know how to run the company successfully, we do possess some knowledge related to it – how the company functions. We know that the director has a plan what to do, that he assigns tasks to the staff, that is, he communicates with the staff and that there might be some problems with understanding exactly what he or she wants. We know that there can be several people taking part in managing the company and each of them is responsible for different matters; we know that taking decisions often means negotiating them and convincing others of them, etc. However, before a conceptual metaphor is coined, we still do not exactly know what a strategy is, what information it should contain and what it is needed for. The significance of the metaphor for the target domain is that it not only provides this knowledge but it also imposes coherence on our experience and gives it a structured meaning thanks to which we can start reasoning about it or making some future predictions.

The source domain plays quite a different role in the conceptual metaphor. The MAP domain is much more familiar to us – we know that the map is a drawing of e.g. an area which shows rivers, mountains, and roads linking towns and cities. We know that maps are helpful when we want to get to an unknown place and do not know where to proceed. We know that by sticking to maps we get to the desired destination and that if we are lost we can still reach the place by referring to the map. We also know that maps can become outdated, might not be really precise, can be easily damaged, etc. Out of all this knowledge metaphor selects certain facets and imposes them on the less familiar domain of STRATEGY.

Having established this, we can postulate the following conceptual metaphor: STRATEGY IS A MAP. In consequence, certain elements of the source domain

become metaphorically utilized, particularly the ones referring to the help we can expect from the map, as was neatly illustrated by Williams (209: 8): “you can plot your way and, critically, measure your progress”. At the same time, the domain of STRATEGY receives some structure thanks to which all the actions performed so far as well as the future ones can be viewed as logical and clearly directed at some goal.

Establishing and accepting this relationship means that we provide grounds for drawing certain inferences (Lakoff, Johnson 2003: 142). And what is important about such entailments is that “each of these entailments may itself have further entailments. The result is a large and coherent network of entailments, which may, on the whole, either fit or not fit our experiences (...). When the network does fit, the experiences form a coherent whole as instances of the metaphor” (Lakoff, Johnson 2003: 140).

In other words, both many things we know of the domain of MAP as well as many entailments flowing from it become true of the domain of strategy. If STRATEGY IS A MAP, RUNNING A BUSINESS IS DRIVING TO A SPECIFIC DESTINATION and THE DIRECTOR IS THE DRIVER. Suddenly it becomes clear why the strategy is so crucial in business: without a map you can easily get lost on your way while when you have it you have the view of the whole situation, and it is you that decide which road to take as there are different possibilities to reach your destination. What is more, even if there are some problems, and PROBLEMS ARE OBSTACLES ON THE WAY, there is nothing to worry about as obstacles can be avoided simply by taking a different road. The most serious consequence of such problems is only wasting more time than predicted (though TIME IS MONEY and it is not advisable to waste too much of it), etc. Concluding, it should be noticed that although the basis for the above example was just a single sentence constituting a rather unconventional use of language, its consequences in the form of entailments are really far-reaching.

#### **4. The analysis**

The present article was inspired by the article “Value innovation: a leap into the blue ocean“, where two professors of strategy and management, W. Chan Kim and Renée Mauborgne (2005b), present their vision of competing in the market. The article is based on the book by the same authors (Kim, Mauborgne 2005a).

There is no doubt that both the book and the article have a persuasive character – their aim is to convince the reader about the plausibility of the propounded strategy and encourage as many managers as possible to adopt this strategy in their companies. As a consequence, it can be expected that the authors made a real intellectual effort to present their idea well.

The article begins with an outline of the present day style of doing business which, as the authors admit, “is heavily influenced by its military roots” (Kim,



Mauborgne 2005b: 22). This can be seen in the following expressions used in the article:

*beat* the competition,  
*seize* competitive advantage,  
*battle* for a market share,  
*fight* over price,  
*increase price wars*, etc.

These expressions evoke two conceptual domains: the more abstract, and thus the target domain of BUSINESS COMPETITION and the more familiar, source domain of CONDUCTING A BATTLE. Actually, the authors formulate an almost perfect conceptual metaphor: COMPETITION IS A BLOODY BATTLEFIELD. Although from the linguistic perspective this metaphor should be formulated at a slightly different level of schematicity, e.g. COMPETING IN BUSINESS IS CONDUCTING A BATTLE or MARKET IS A BLOODY BATTLEFIELD, it seems to convey the gist.

The authors also predict certain entailments of such a metaphor, which quite quickly become common knowledge for anyone engaged in doing business: there is only so much territory that exists, the territory can only be gained by competing against each other, there is a winner and a loser, rivals fight over shrinking profits, as the market space gets more crowded, prospects for profits and growth are reduced, cut-throat competition turns the market bloody, etc. Not all entailments are mentioned, though they may be equally evident, e.g. that the loser often dies (which can be literally the case in e.g. Japan where some bankrupt executives do commit suicides or in Europe and America where they die of heart attack).

There is one more issue worth mentioning here, which is the result of psychological research (Gibbs 1994: 115ff) on language comprehension. Although such expressions as *battle* for a market share or *cut-throat competition* will be rather commonly regarded as metaphorical and, as such, considered “just innocent phrases”, the reaction of our brain is quite different. It turns out that “readers may comprehend the meanings of tropes without recognizing that each utterance is metaphorical, ironic, or idiomatic and so on” (Gibbs 1994: 118). In other words, although we *know* such expressions are metaphorical, our brain, depending on the amount of time spent on apprehending them, *may process* them as if they were literal. In consequence, *waging a battle*, *losing* it or *being killed in* it may become real, which may be one of the reasons why so many managers and executives suffer from excessive stress both at work and beyond it – our brain perceives business as an exposure to a real possibility of dying. And a typical, evolutionary reaction of our brain to such an exposure is preparing the body for fight or escape. Although today such external signs are tamed, the functioning of the brain has not changed in this respect.

Whatever the reason, for Kim and Mauborgne this kind of vision is unacceptable – they believe that doing business can take a different form – what

they propose instead is blue ocean strategy. Since the blue ocean becomes the source domain of the proposed conceptual metaphor, let us consider what we know about it. First of all, I wish to focus on the colour of the ocean – it is blue which, as opposed to the bloody battlefield, forms very pleasant associations: probably one of the first ones will be a blue, clear sky on a beautiful, sunny day. Another facet of the metaphor is the place: it can be an exotic one, from which we have a lot of wonderful memories, with no people, and far away from problems. A place like in the picture – where everyone wants to go. There are other elements of the knowledge we have about oceans: that they are quite different from battlefields. They have no boundaries and, consequently, if you want more territory, you can find it anywhere and you do not have to fight for it. Even if competition attacks you, you can always escape – the ocean is unlimited.

Although this time they do not introduce it explicitly, the authors implicitly impose the following conceptual metaphor: MARKET IS A BLUE OCEAN. Why is it so different from the previous one – MARKET IS A BLOODY BATTLEFIELD? Even if what we do every day at work does not change – nobody needs to wear swimsuits to work – the general vision and, as a consequence, also the language we use to talk about it and its entailments, are very different. Doing business is about creating and capturing blue oceans and, “once a company has created a blue ocean, it should prolong its profit and growth sanctuary by swimming as far as possible in the blue ocean, making itself a moving target, distancing itself from potential imitators, and discouraging them in the process. The aim is to dominate the blue ocean over imitators for as long as possible” (Kim, Mauborgne 2005b: 28). If there is too much competition, what you need to do is reach out for a new blue ocean.

Of course, the strategy might cause uncertainty and anxiety, which Kim and Mauborgne also predict. The interesting point about it is that although they do not state it overtly, this uncertainty and anxiety might stem from the entailments of the MARKET IS A BLUE OCEAN metaphor: some people may be discouraged from such a strategy simply because they are afraid of sailing the ocean. What is more, we know that there are a lot of known and unknown dangers in it, and such knowledge must raise some objections. However, the authors overcome them by claiming that “blue ocean strategy is about risk minimization and not about risk taking” (ibid.: 27). They identify six key risks of the strategy and offer six principles thanks to which the risk is eliminated or, at least, minimized.

All in all, the authors build a complete and coherent vision of business. Basing on our common knowledge, they juxtapose the present style of doing business with the one proposed by them. They point to the advantages as well as potential risks of both strategies and successfully show the superiority of their idea. Actually, they go even farther than this – they also repair all incongruities such a vision might entail.

What I would like to consider now is a conceptual clash which arises from these two pictures: on the one hand, the old metaphor of the market as the bloody battlefield establishes the territory on land while, on the other hand, the blue



ocean metaphor is set in water. That is, changing the old strategy for a new one might create a conceptual problem: the staff has to leave the land and immerse in water. Although most of the listeners would not probably be aware of it, such a shift might introduce some anxiety as for the type of actions they should take up. It might also discourage them because of negative associations they may have with it. Some listeners might feel that sailing the ocean requires changing the style of managing or putting a lot of additional effort managing in new circumstances, which might demoralise the staff instead of helping.

However, Kim and Mauborgne seem to have predicted this problem, too. What is more, the solution offered by the authors is both clever and efficient: they introduce one more metaphor, which I would call the bridging metaphor, *THE PRESENT MARKET IS A RED OCEAN*. What is more, they use it explicitly: “imagine a market universe composed of two sorts of oceans – red oceans and blue oceans. Red oceans represent all the industries in existence today. This is the known market space. Blue oceans denote all the industries not in existence today. This is the unknown market space” (ibid.: 25). By introducing this metaphor the authors achieve a conceptual integrity between the present situation of the company and what it is supposed to do in the future: they transform the present battlefield on land into an ocean. This metaphor solves the problems I have mentioned: instead of moving from land to water, that is changing one element for another, it turns out that we are already in water, which means that we can swim or sail and can efficiently function there. We do not need to be afraid of it or put any additional effort to function in it, either. Moreover, the passage from the red ocean we are in to the blue ocean is operationally conceivable and, actually, rather simple: you must get out of existing market boundaries, create a blue ocean and, consequently, sail into it.

## 5. Conclusions

It needs to be observed that introducing a good strategy requires preparation at more than one level. The first of them, and perhaps the one which exerts most influence on the hearers, is the level of metaphor applied in the strategy. The selection of appropriate metaphor, both rich in positive connotations and adequate for running a company, takes both a thorough knowledge of the given domain as well as skill and creativity in language. At the same time, it constitutes an unconventional use of language based on specific “cognitive preferences and styles we put to use for the creation of abstract thought” (Kövecses 2005: 231), which is one of the main reasons for metaphorical variation across cultures and languages.

As for the second level, it is a more subtle issue because it refers to the coherence of the given idea. Replacing the *BLOODY BATTLEFIELD* metaphor with the *BLUE OCEAN* metaphor resulted in confronting two different, incongruent visions of the market, leading to a conceptual incongruence which

might result in some problems in convincing the recipients and eventually implementing the idea. However, this problem was skilfully solved through the application of the bridging metaphor of the present market as a red ocean. This made the blue ocean vision both congruent with the bloody battlefield standpoint and allowed a smooth shift from one vision to the other, as well as made the ultimate goal more easily achievable for the company. As can be seen, devising a persuasive strategy is not an easy task and it requires a multifaceted talent.

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